Chapter IX: View Documentation

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Documents Tab Overview

You maintain and review patient care documentation in the **Documents** chart section. You also can access the document entry function.

The **Display** window is where the documents appear, either in **Summary** format a grid format with the categories and documents down the left side and the dates across the top, or in **Report** format a hierarchical tree structure with the documents listed below their category and item names. The **View Control Panel**, on the left side of the screen, allows you to select your criteria for displaying documents, including the display format.

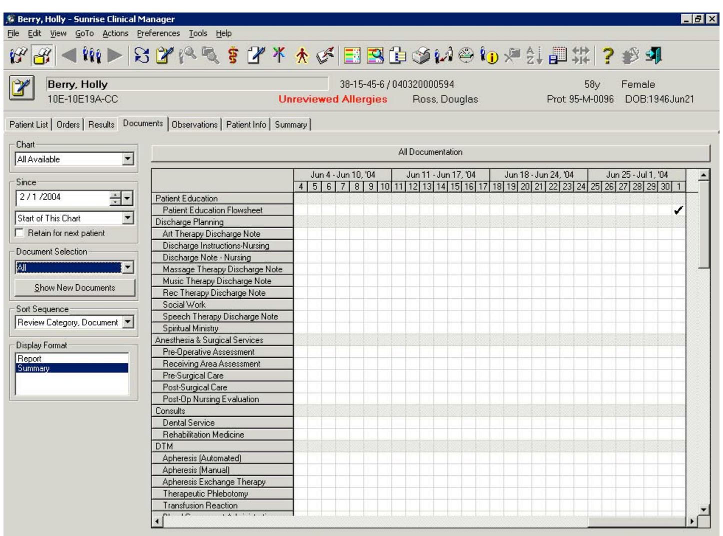
Most documents are displayed by a department sort. Discharge planning documents, however, all display in a separate header.

Documents Chart Section

You can quickly retrieve and view documents, and filter the documents you want to see. You can also set personal preferences for viewing documents.

The **Display** window is where the documents appear, either in **Summary** format – a grid format with the categories and documents down the left side and the dates across the top, or in **Report** format - a hierarchical tree structure with the documents listed below their category and item names.

The **View Control Panel**, on the left side of the screen, allows you to select your criteria for displaying documents, including the display format.



Screen 1: Documents Tab

The **Function** buttons are enabled in the **Report** display format and are as follows:

- **New Document Icon -** Opens the **Document Entry Worksheet**, where you can enter documents for the selected patient.
- **View Documents – In report display format o**pens the **Document Details** dialog box, where you can view the contents of the document.

View new documents from the Documents tab:

- On the **View Control Panel**, click the **Show New Documents** button.
- The **New Documents** dialog box opens. If you want to acknowledge viewing the documents, check the **Clear Flag** button. The flag will be removed from the **New Documents** column in the **Patient List**. If you don't want to remove the flag, for example, if you haven't finished reviewing all the documents, click the **Don't Clear** Flag button.

Filters – Documents tab

Definitions

- **Chart**: **All Available** refers to all information for all visits. **This Chart** is limited to this visit.
- **Since**: Used to specify a date range for viewing. When you know exact dates, enter the start date in the **Since** field. If there is an end date, enter the date in the **To** field. You can also use pre-defined timeframes from the drop-down list such as one week ago or one month ago. You should not use both options at the same time. Note: If a time frame is used it will change the Since date.
- **Document Selection**: This option lets you view **ALL** information by department or category. Other categories are also available:
  - Anesthesia & Surgical Services
  - Consults
  - Discharge Planning
  - DTM
  - Nursing
  - Nutrition
  - Patient Education
  - Pharmacy
  - Rehabilitation Medicine
  - Respiratory Therapy
  - Social Work
  - Spiritual Ministry

- **Display Format:** This option gives you multiple ways to view information which may appear as a **Report** or **Summary**.

Apply filters

To view documents for:

- The current chart only
  1. In the **Chart** drop-down list on the View Control Panel, select **This Chart**.
- All available charts
  1. In the **Chart** drop-down list on the View Control Panel, select **All Available**.

To select the date range for viewing Documents:

1. In **Date Range** group box in the **View Control Panel**, do one of the following to provide a **Since** date:
   a. In the **Since** field, enter a specific date.
   b. Use the increase/decrease arrows to change the date one day, month, or year at a time.
   c. Click the calendar arrow and select a date. Select the day after you have selected the month and year.
   d. Select a pre-defined option from the drop-down list, such as Start of This Chart.
1. Do one of the following to provide a **To** date:
   a. In the **To** field, enter a specific date.
   b. Click the increase/decrease arrows to change the date one day, month, or year at a time.
   c. Click the calendar arrow and select a date.

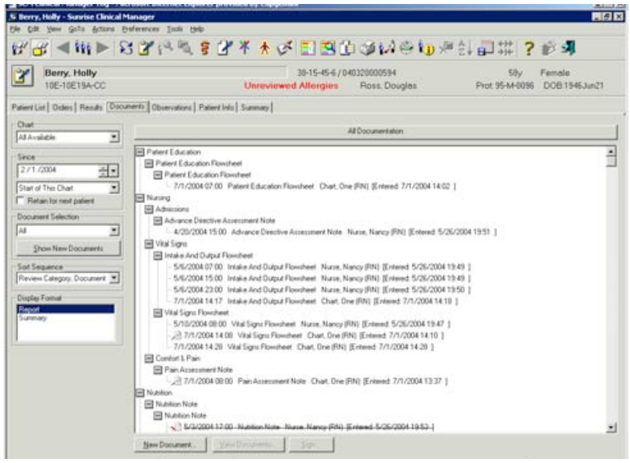
To view Documents of a particular status:

- In the Status drop-down list on the View Control Panel, select the desired filter.

To view particular types of Documents:

- In the **Documents Selection** drop-down list on the View Control Panel, select the desired filter.

Report View **-** Displays document sorted by date and time, and each document with the associated order as its header.

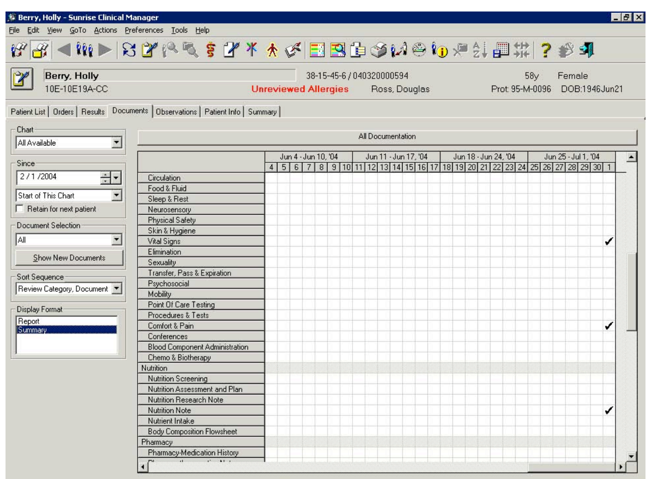


Screen 2: Document Report View

When you double-click a cell in the spreadsheet, the selected Documents display in **Report** view, and include the performed date/time, all numeric and textual information, the result reference range (if available), and the abnormality.

Summary View

The **Summary** view displays an overview of documents for a selected patient, based on the options you have selected in the **Chart**, **Since**, and **Document Selection** sections in the **View Control Panel**. The **Summary** view does not provide detailed document information, but rather whether or not specific documents exist for a given date. The information displays in a grid with dates at the top and result categories on the left side.



Screen 3: Document Summary View

Remove Filter

Once a filter is applied, you can remove it or change to another filter. To remove a filter, change the selection back to **All**.

New Documents

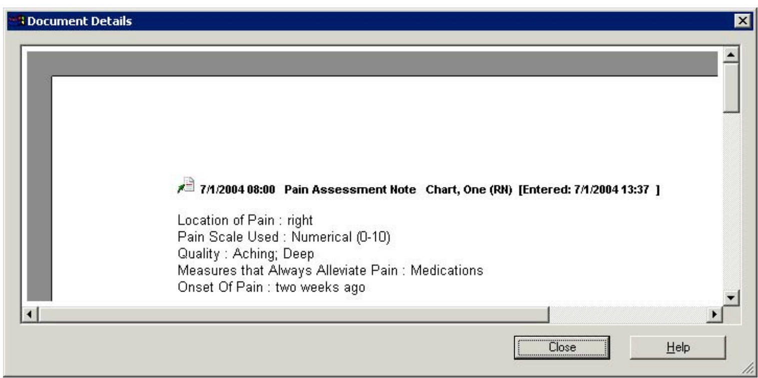
To view new Documents from the Documents tab:

1. Click the **Show New Documents** button. The **New Documents** dialog box will display.
2. To clear the flag, click **Clear Flag** on the **New Documents** dialog box. Otherwise, click **Don't Clear Flag**.

View Document Details

You can view document details in one of the following ways:

- From the Documents tab, right-click on a document and select View Document Details.
- From the Documents tab, click the View Documents button.



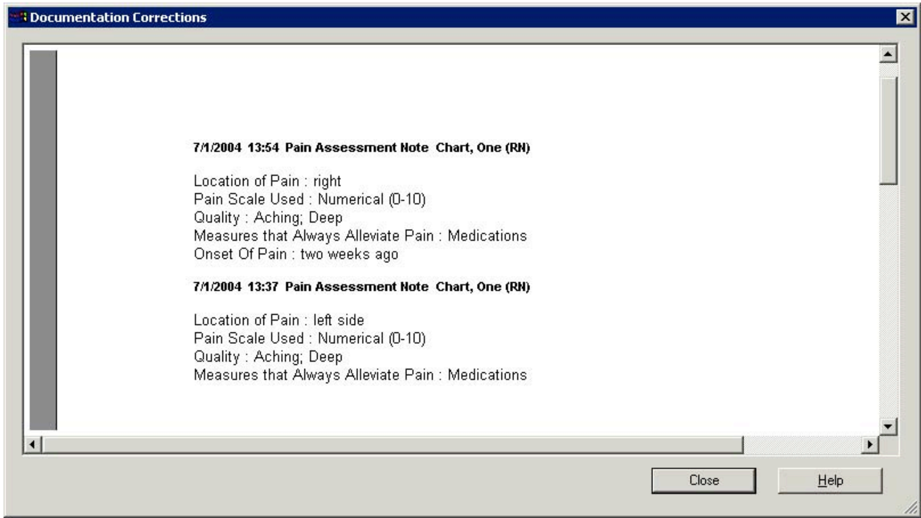
Screen 4: View Document Details window

View Corrected Documents

You can view documents that have been corrected – both the original documentation and the corrected documentation.

To view corrected documents

1. In **Report** view, select the document for which you want to see the edits.
2. Right-click on the document and select **View Corrections** from the shortcut menu. The **Documentation Corrections** dialog box opens in view mode; you can view the information, but not edit it.



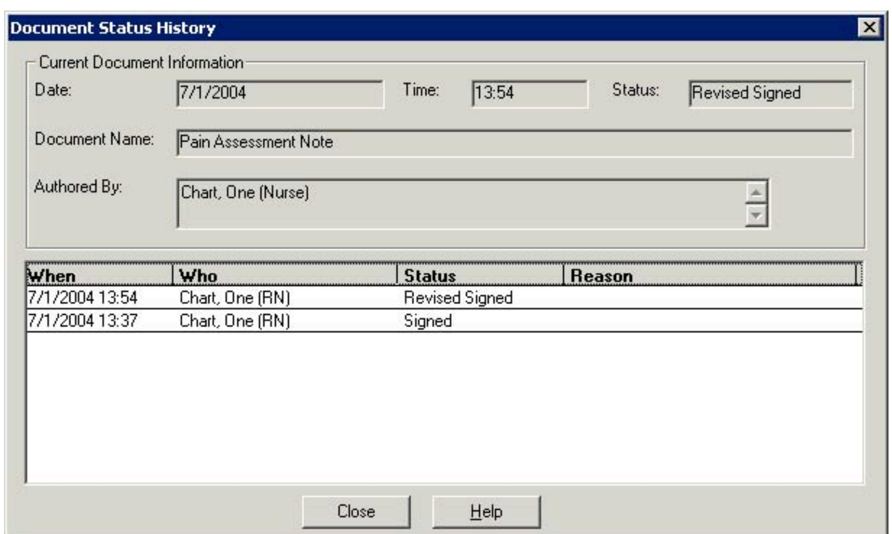
Screen 5: Document Corrections window

View Status History of a Document

You use the **Document Status History** dialog box to see the status changes a document has gone through.

To view the status history of a document:

1. In **Report** view in the **Documents** chart section, select the document for which you want to view the status history.
2. From the shortcut menu, select **Status**, then **History**.



Screen 6: Document Status History window

Personalizing Your Document Tab View

Change and save time scale for viewing Documents

You can change the time scale for the dates in the **Summary View** on a per-patient basis. There are up to four options:

- Days
- Weeks
- Months
- Years

Note: Depending on the date specified in the **Since** field, some of the selections in the **Actions** menu may be disabled. For example, if the value in the **Since** box is less than one month, **Months** and **Years** are disabled. If the value in the **Since** box is more than 6 months (such as a year ago), **Days** is disabled.

To change the time scale:

1. Display the **Documents** chart section.
2. In the View Control Panel, select **Summary** from the **Display Format** list.
3. In the **Since** group box, select or enter how far back you want to display Documents.
4. From the **Actions** menu, select **Modify Time Scale** and then choose the interval you want. You can save the time scale for viewing a patient's Documents in the **Summary** view of the **Documents** chart section. The time scale remains as you have selected for that patient, until you select and save a different interval.

To save the current time scale:

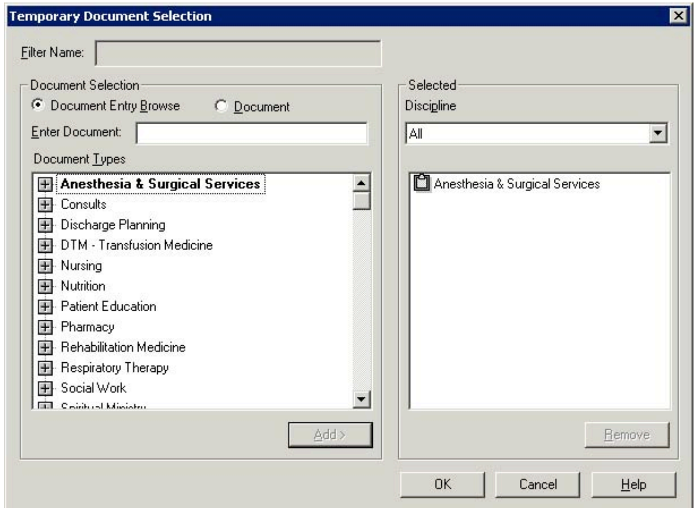
1. Do one of the following:
    a. Click the **Save Time Scale** icon on the toolbar.
    b. From the Preferences menu, select **Save Time Scale**.
2. The Save Time Scale icon displays at the top left corner of the Display window to indicate that you have saved a time scale.

Creating a temporary document selection filter

The **Temporary Document Selection** dialog box allows you to select Documents to be displayed in the view on a one-time or temporary basis. This filter is cleared and not saved after you log off or select another filter.

To create a temporary selection filter:

1. From the **Document Section** filter, select **<Temporary Selection…>.** The **Temporary Result Selection** window displays.



Screen 7: Temporary Documents Selection Window

Setting your preferences for viewing Documents

The **Personal Documents View Options** dialog box allows you to set up customized, personal preferences for the **Documents** chart section. By setting your preferences, you can see the information important to you in the **Documents** chart section. The three tabs in this dialog box allow you to:

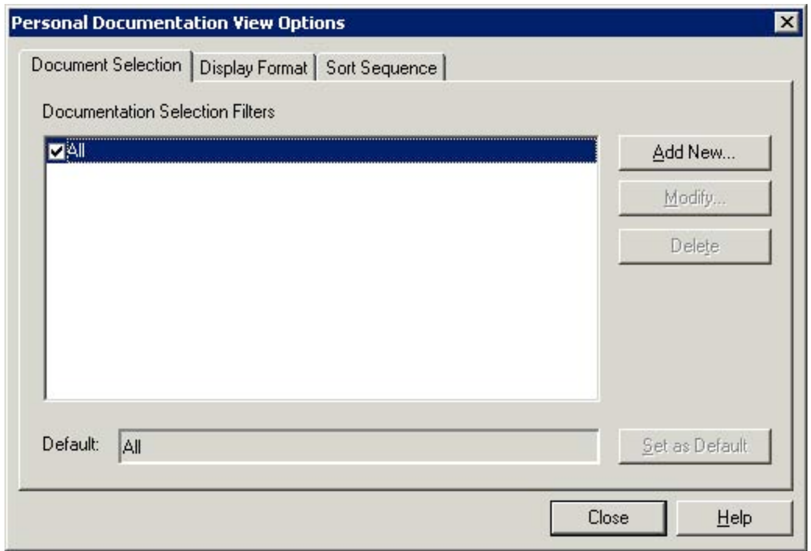
- Create and maintain filters for the types of Documents you want to view (**Document Selection** tab).
- Create graph filters (**Graph Selection** tab).
- Specify the default Document selection filter and display format for the chart section (**Display Format** tab).

Documents Selection Tab

The **Document Selection** tab of the **Personal Documents View Options** dialog box displays the current Document selection filters. In this dialog box, you can add, change, or delete filters, and choose a default filter for when you display the **Documents** chart section. If you do not choose a default filter, the filter **All** (which cannot be deleted or modified) is the default. You can create a new filter and make it the default, or you can make an existing filter the default.

To add a Document selection filter:

1. From the **Preferences** menu, select **Documents**. The **Personal Documents View Options** dialog box opens.
2. Click the **Document Selection** tab.
3. To create a new filter, click **Add New**. The **Add New Documents Selection Filter** dialog box opens.

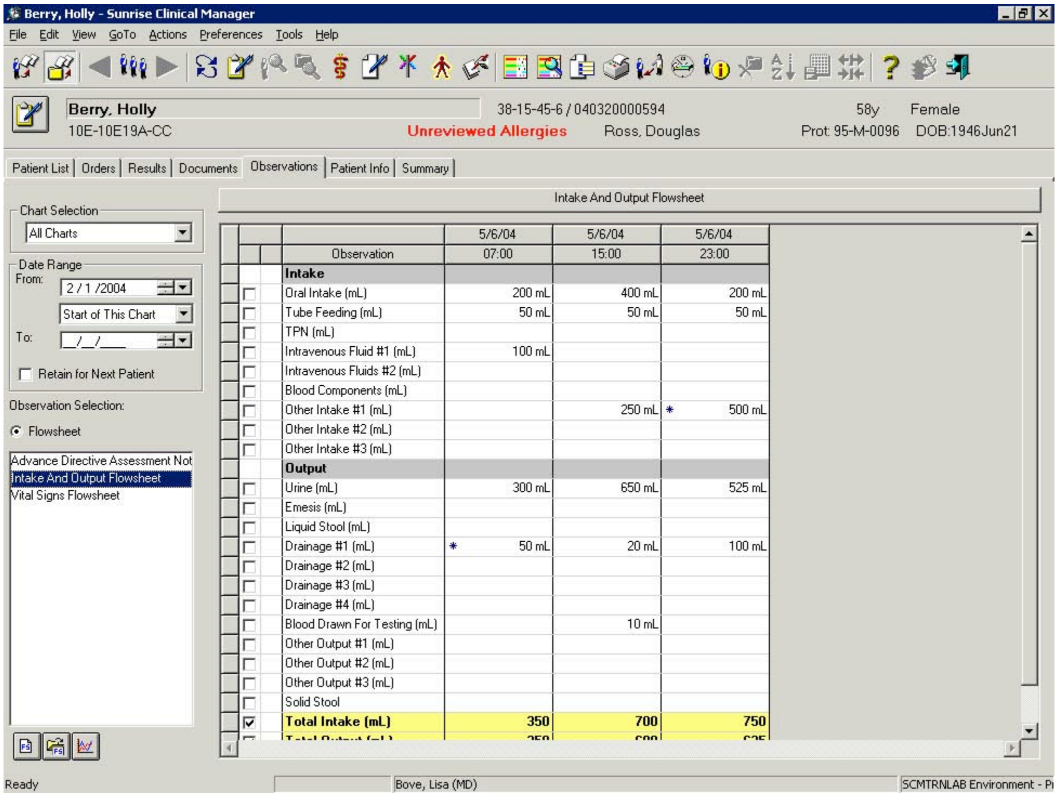


Screen 8: Add New Documents Filter Window

4. Type a name for your new Documents filter in the **Filter Name** field.
5. In the **Document Selection** group box, do one of the following:
   a. Click **Document Browse**. The **Browse** shows a tree structure of Document groups and items. Select the group or item you want included in the filter. To select sequential groups or items, hold down Shift and click on each choice. To select non-sequential groups or items, hold down Ctrl and click on each choice.
   b. Click **Document Item**. Enter part or the entire name of the item you want to include in the filter. When you enter part of the name and pause, an alphabetical list of items that begin with the characters you entered displays in the browse window.
6. Select a category or item and click **Add** to place the selected item(s) in the **Selected** list. To delete any groups or items from the **Selected** list, select the category or item and click **Remove**.
7. Click **OK** to return to the **Document Selection** tab.
8. If you want to make the new filter the default, click **Set as Default**.
9. Click **Close** to save the filter and return to the **Documents** chart section. The new filter appears in the **Document Selection** drop-down list in the **View Control Panel**. If you selected the filter as the default, it will be used the next time you log on and display the **Documents** chart section.

Observation Tab Overview

The **Observations** chart section is where you view flowsheet documents and the observations that are contained in them. It is comprised of the **View Control Panel** and the **Display** window.



Screen 9: Observations tab

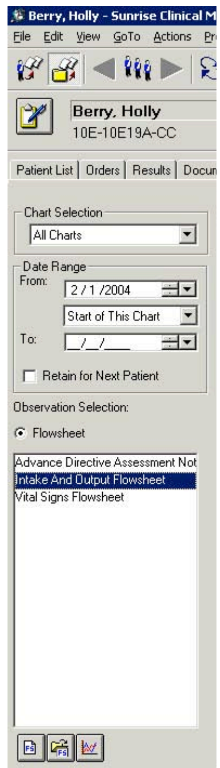
The **View Control Panel**, to the left of the **Display** window, is where you set your criteria for displaying observations.

The **Display** window displays observations in the form of numbers, text, and graphs, based on the type of observation and the display format you select. Two display formats are available:

- The **Trend** view displays dates across the top and observation items and their modifiers down the side in a grid format. The **Trend** view is similar to the **Trend** view in the **Results** chart section.
- The **Graph** view displays selected data elements from the **Trend** view in graphic format. These graphs are similar to the ones you can view in the **Results** chart section.

Filters – Observation tab

The **View Control Panel** is where you specify the observations you want to view, and the format in which you want to display them in the **Display** window of the **Observations** chart section.



Screen 10: Observations tab View Control Panel

- **Chart Selection**: **All Charts** refers to all information for all visits. **This Chart** is limited to this visit.
- **Date Range**: Used to specify a date range for viewing. When you know exact dates, enter the start date in the **From** field. If there is an end date, enter the date in the **To** field. You can also use pre-defined timeframes from the drop-down list such as one week ago or one month ago. You should not use both options at the same time. **Note**: If a time frame is used it will change the Since date.
- **Observation Selection**: All the Flowsheets that have been entered for this patient are listed in this section. The highlighted flowsheet is displayed. To display another flowsheet, click on the flowsheet name from this list.
- **Icons**: Three icons display at the bottom of the View Control Panel.

Screen 11: Flowsheet View Control Panel Icons

- The fist icon opens the Flowsheet Manager to allow you to select a new flowsheet.
- The second icon opens the highlighted flowsheet to allow you to document a new column.
- The third icon toggles the view between the flowsheet view and the graph view.

Viewing Observations from the Observations tab

The **Flowsheet** view displays observations in a grid or spreadsheet format. The dates and times that observations were recorded are displayed in ascending order. The most recent data is at the far right side. You can resize the column widths. Each column of observation entries represents an "instance" of the flowsheet document.

- If an observation contains text, you can highlight the cell to display the text in a separate window.
- If an observation has been edited, it is marked with a sheet of paper icon.
- If an observation has been canceled, it is displayed in strikeout text.
- If an observation has a comment attached, it is marked with a comment icon.
- If an observation can't be selected, it is displayed in gray text.

You can do the following in the Flowsheet view:

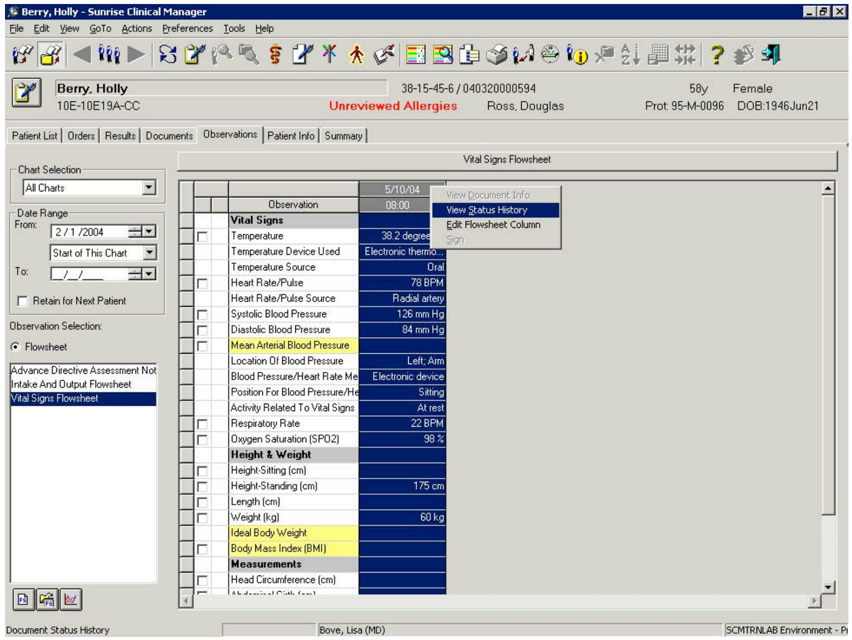
- View the status history of a flowsheet document.
- View corrected observations.
- Discontinue a flowsheet.

Viewing the Status History of a Flowsheet

You can use the **Document Status History** dialog box to see the status changes a flowsheet document has gone through. You can select his option directly from the Observations tab view.

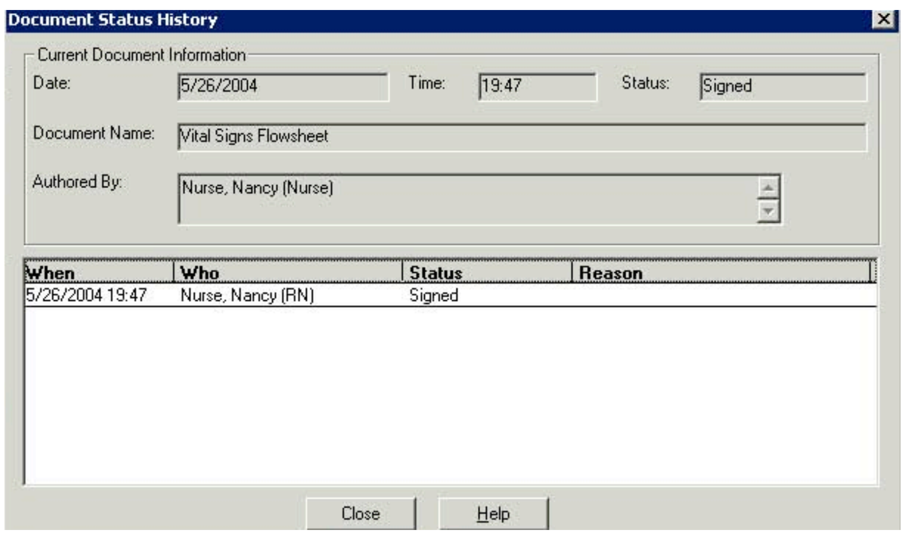
To view status history of a flowsheet from the Observations tab

1. Display the flowsheet by selecting it from the **Observation Selection** panel.
2. Right-click on the column header.



Screen 12: View Status History from Observations tab

3. Select **View Status History** from the short-cut menu.



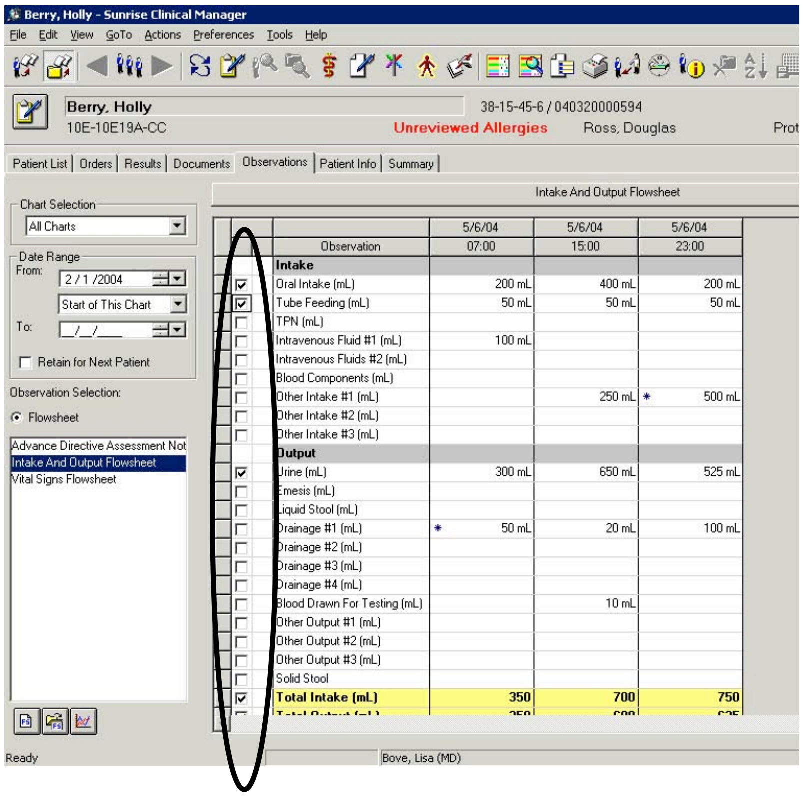
Screen 13: Document Status History window

Graph Flowsheet Data

You can view observations in a graph format when you click the **Graph/Trend** icon in the **View Control Panel** of the **Observations** chart section. The icon toggles between Graph and Trend View.

Screen 14: Flowsheet & Graph Icons

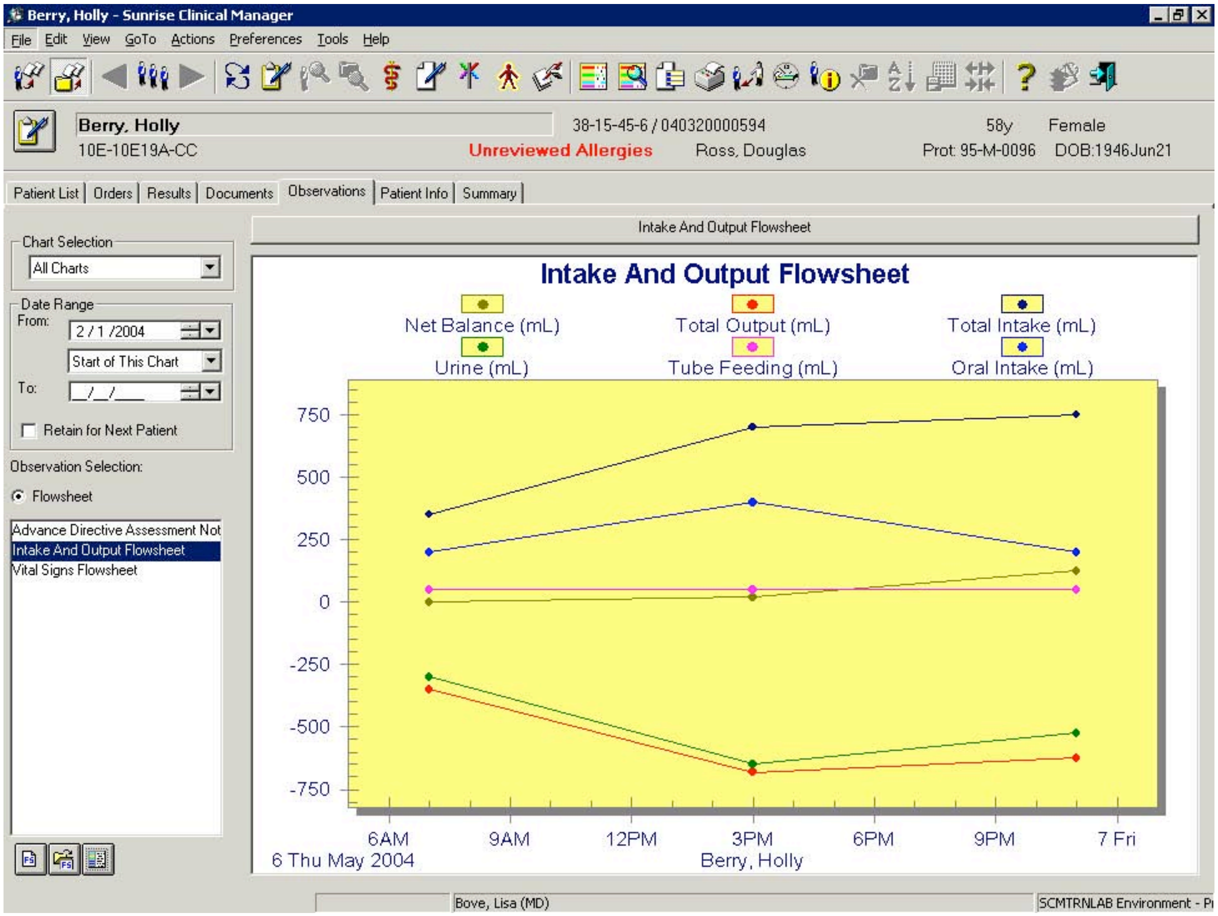
A check mark indicates that the observation item can be graphed. You can uncheck the box if you don't want an observation to appear on the graph.



Screen 15: Graph checkboxes

To graph Flowsheet elements

1. From the Observations tab, select the desired flowsheet from the Flowsheet Selection list.
2. Click the checkboxes for the data elements to graph.
3. Click the Flowsheet icon in the lower, right corner of the control panel.
   Note: This icon toggles between Graph and Flowsheet depending on which view you are on.



Screen 16: Graphed flowsheet data

4. Click the Graph icon to return to the flowsheet trend view.